



## **Job Aid:**

### **How to Create a Bid Using Rolling and Open Enrollment**

#### **This Job Aid Shows How To:**

- Create a Bid Using Rolling and Open Enrollment

#### **Of Special Note:**

Guidance for rolling and open enrollments can be found in Section III, E, xi, c of the [Best Value Procurement Handbook](#).

#### **Rolling Enrollment:**

- Allows you to accept bids and review them as they come.
- Has one enrollment period to award vendors to an established contract
- Allows purchaser to award vendors anytime
- Must act as informal

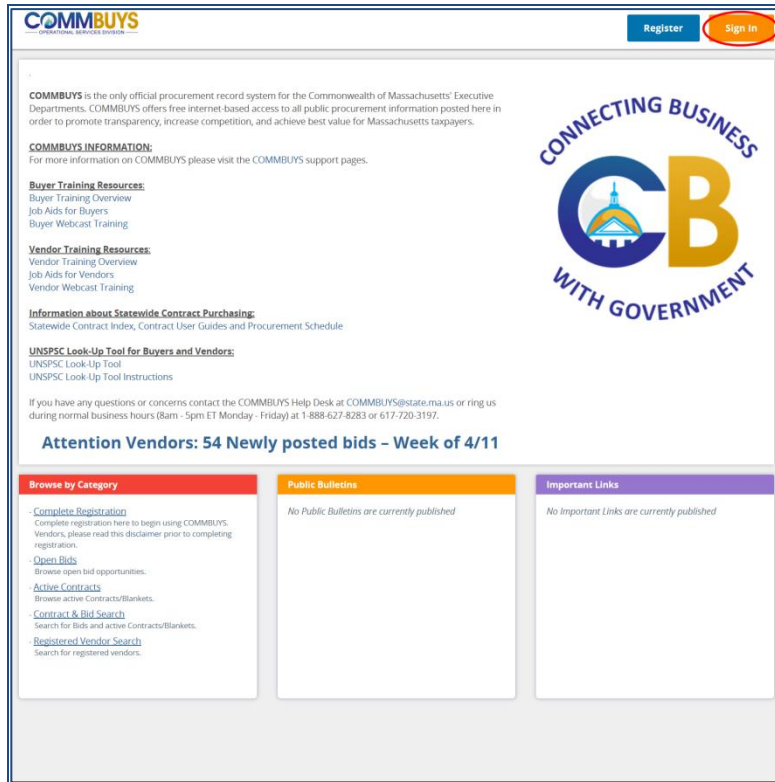
#### **Open Enrollment:**

- Allows the Strategic Sourcing Services Team (SSST) to re-open the contract at any time (or at set intervals) to add new vendors.
- Allows adding vendors to an established contract
- Allows awarding to vendors during the open enrollment period
- Has multiple quote submission periods
- Must act as informal

## Job Aid:

### How to Create a Bid Using Rolling and Open Enrollment

#### Screenshot



#### Directions

##### Step 1: Accessing the COMMBUYS Landing Page

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.
3. Enter your Login ID and Password and click on the **Sign In** button.

✕

## Welcome to COMMBUYS

Login ID

Password

Sign In

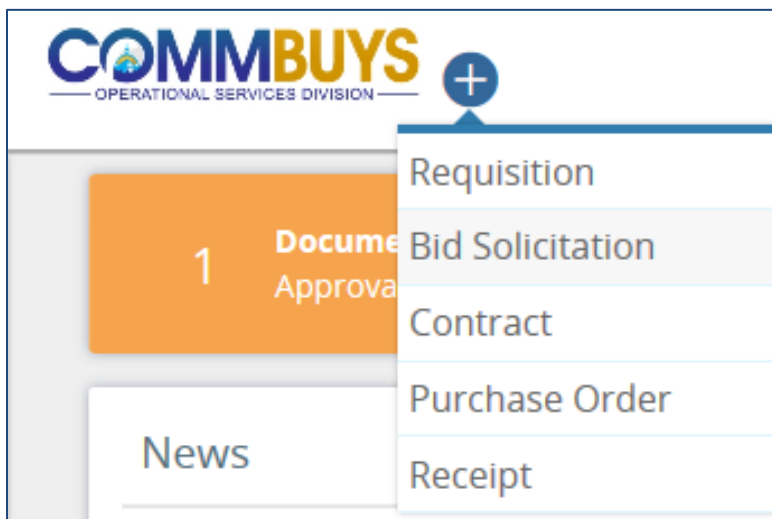
[Login Assistance](#)

## Job Aid:

### How to Create a Bid Using Rolling and Open Enrollment

#### Step 2: Creating a New Bid

1. Click on the **Add Documents** (plus sign) icon.
2. Select **Bid Solicitation** from the dropdown menu.



#### Step 3: Creating a New Bid From Scratch

1. Ensure that the **Create a bid from scratch** radio button is pre-selected.
2. Click on the **Continue** button.

Create a New Bid

Please select the method to create a new bid:

☒ Create a bid from scratch.

☐ Clone a bid from another document.

☐ Copy Contracts For Renewal.

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#### Step 4: Completing the Left Side of the New Bid Screen

- The New Bid screen opens to the General tab. On the left side of the screen, all fields with an asterisk are required. The required fields are:
  - Department:** This defaults from the user profile. It may be changed using the dropdown if other departments are available to the user.
  - Location:** This defaults from the user profile. It may be changed using the dropdown if other locations are available to the user.
  - Available Date:** This field identifies when the bid becomes available for viewing. Clicking the calendar icon next to this field displays the current date and time. Clicking the **Now** button inserts the current date and time into this field. Click the **Done** button when you have entered the desired date. You can enter a different date and/or time using the calendar and scroll bar.  
**NOTE:** If you need to change the calendar year, do so before changing the month and day.
  - Purchase Method:** Open Market defaults from the dropdown menu.
  - SBPP (Small Business Purchasing Program) Eligible?:** Select "Yes" if up to \$150K or "No" if over \$150K
- Optional fields include:
  - Info Contact:** The contact person for this bid.
  - Pre-Bid Conference:** This field is available to capture bid conference information if applicable.
  - Bulletin Description:** This field is available for a brief description of the bid and how it will display.

**New Bid**

General Items Address Accounting Routing Attachments Notes Bidders Amendments Q & A Reminders Summary

Bid Number:


Status: 2B1 - In Progress


How Solicited: Email

Department:

Location:

Show on Web: ☒

Required Date: 

Available Date: (MM/DD/YYYY HH:MM:SS AM or PM) 

Bid Type: Open Bid

Control Code:

Print Dest Detail: Always

Purchase Method: Open Market

Tax Rate:

Solicitation Enabled: No

Item Single Award Only: ☐

Info Contact:

Pre-Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

SBPP (Small Business Purchasing Program) Eligible?:

See SBPP requirements and exceptions at [www.mass.gov/sbpp](http://www.mass.gov/sbpp)

Date Last Updated:

## Job Aid:

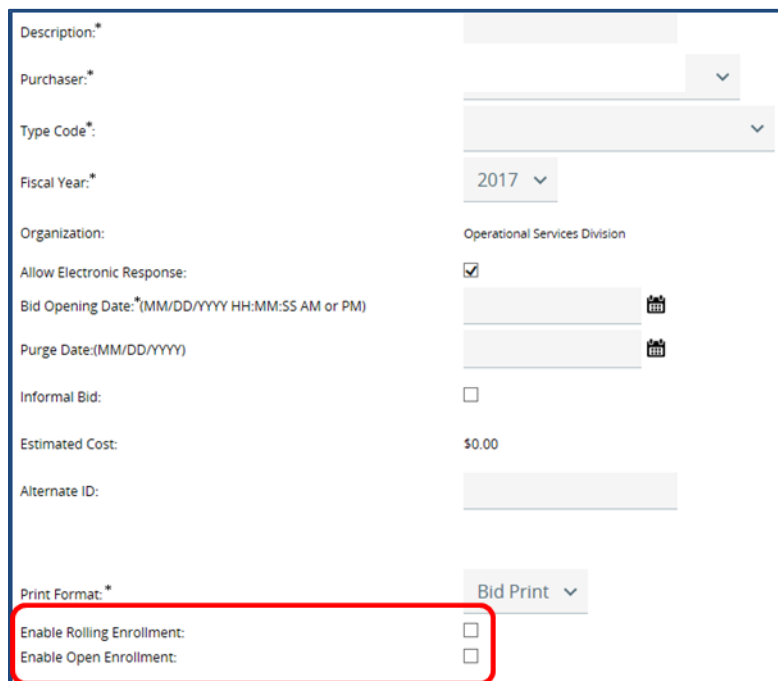
### How to Create a Bid Using Rolling and Open Enrollment

#### Step 5: Completing the Right Side of the New Bid Screen

1. All fields with an asterisk are required. The required fields are:
  - **Description:** Title of your bid. This field is used as search criteria to locate a bid, so be specific.
  - **Purchaser:** This defaults to your name. Use the dropdown to select a different purchaser.
  - **Type Code:** NS (non-statewide solicitation) – if posted for a good or service not on a SWC. SS (statewide solicitation) – if posted as a requirement for purchasing off a SWC.
  - **Fiscal Year:** This field defaults to the current Fiscal Year. Use the dropdown to select a different year if appropriate.
  - **Bid Opening Date:** This date is the date that will close the bid to the public. On this date, COMMBUYS will no longer accept quotes for that bid and the Buyer will be able to open and view the quotes. This date can be changed in the same manner as the Available Date.
  - **Print Format:** Leave Bid Print as the default.

The optional fields at the bottom of the screen are available to choose either rolling or open enrollment.

- **Enable Rolling Enrollment:** Selecting this checkbox allows you to accept bids and review them as they come.
- **Enable Open Enrollment:** Selecting this checkbox allows the SSST to re-open the contract at any time (or at set intervals) to add new vendors.



Description:\*

Purchaser:\*

Type Code:\*

Fiscal Year:\*

Organization: Operational Services Division

Allow Electronic Response: ☒

Bid Opening Date:\*(MM/DD/YYYY HH:MM:SS AM or PM)

Purge Date:(MM/DD/YYYY)

Informal Bid: ☐

Estimated Cost: \$0.00

Alternate ID:

Print Format:\*

Enable Rolling Enrollment: ☐

Enable Open Enrollment: ☐

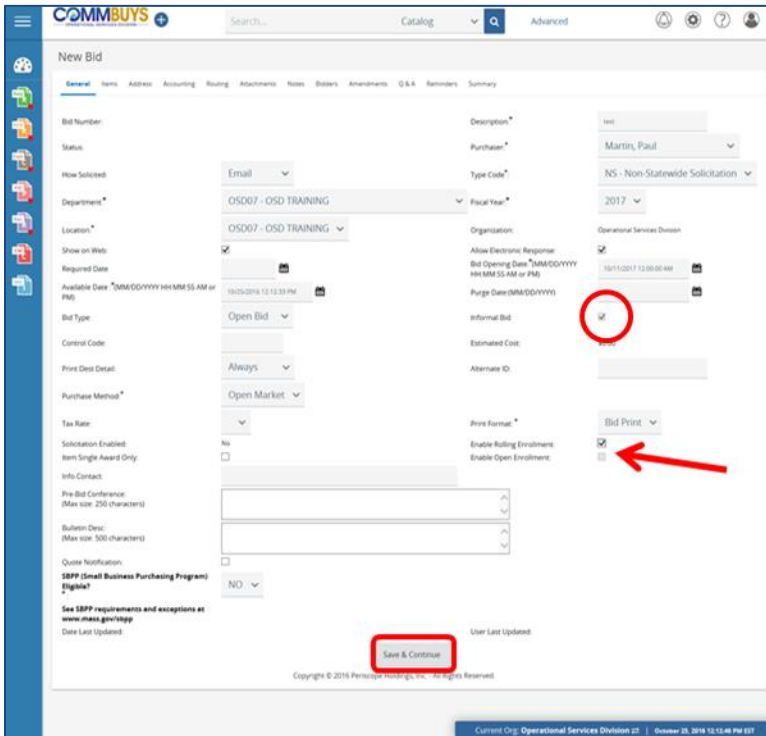
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### How to Create a Bid Using Rolling and Open Enrollment

#### Step 6: Selecting Rolling Enrollment

**NOTE:** To select Enable Open Enrollment, skip to Step 8.

1. Select the **Enable Rolling Enrollment** checkbox. When you do so, note that the Informal Bid checkbox automatically fills in with a checkmark.
2. Click on the **Save & Continue** button.



The screenshot shows the 'New Bid' form in the COMMBUYS system. The form is divided into several sections. In the 'Informal Bid' section, the 'Enable Rolling Enrollment' checkbox is checked, and the 'Informal Bid' checkbox is also checked. A red circle highlights the 'Informal Bid' checkbox, and a red arrow points to the 'Enable Rolling Enrollment' checkbox. At the bottom of the form, the 'Save & Continue' button is highlighted with a red rectangle. The footer of the form indicates the user is 'User Last Updated' and the system is 'Copyright © 2016 Persico Technology, Inc. All Rights Reserved'.

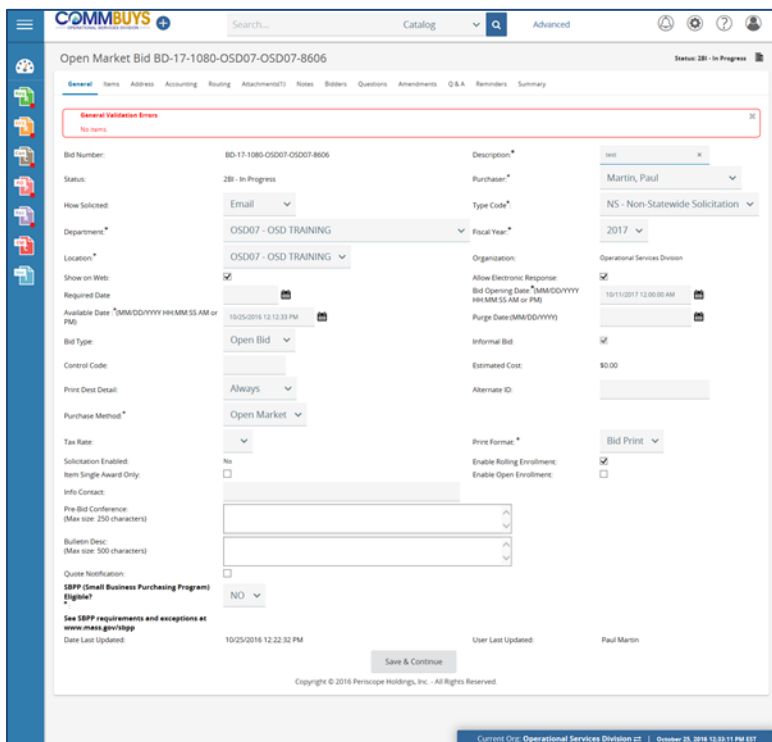
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#### Step 7: Completing the Remaining Tabs

The General tab screen redisplay with a warning reminding you that no items have been selected. Continue working through the tabs from left to right filling in all the information, then scroll to the bottom of the Summary tab page and click on the **Submit for Approval** button.

**NOTE:** For additional information on completing the tab screens, the complete process is outlined in the Buyer Job Aid entitled *How to Create a Bid From Scratch*.



Open Market Bid BD-17-1080-OSD07-OSD07-8606

Status: 2B - In Progress

General Validation Errors: No items

Bid Number: BD-17-1080-OSD07-OSD07-8606

Description: Text

Status: 2B - In Progress

Purchaser: Martin, Paul

How Selected: Email

Type Code: NS - Non Statewide Solicitation

Department: OSD07 - OSD TRAINING

Fiscal Year: 2017

Location: OSD07 - OSD TRAINING

Organization: Operational Services Division

Show on Web: ☒

Allow Electronic Response: ☒

Required Date: 10/25/2016 12:13:33 PM

Bid Opening Date: 10/11/2017 12:00:00 AM

Available Date: 10/25/2016 12:13:33 PM

Purge Date: 10/11/2017 12:00:00 AM

Bid Type: Open Bid

Informal Bid: ☒

Control Code: Always

Estimated Cost: \$0.00

Print Desc Detail: Always

Alternate ID:

Purchase Method: Open Market

Tax Rate:

Print Format: Bid Print

Solicitation Enabled: ☒

Enable Rolling Enrollment: ☒

Item Single Award Only: ☐

Enable Open Enrollment: ☐

Info Contact:

Pre Bid Conference: (Max size: 250 characters)

Bulletin Desc: (Max size: 500 characters)

Quote Notification: ☐

SBPP (Small Business Purchasing Program) Eligible? NO

See SBPP requirements and exceptions at [www.mass.gov/sbpp](http://www.mass.gov/sbpp)

Date Last Updated: 10/25/2016 12:22:32 PM

User Last Updated: Paul Martin

Save & Continue

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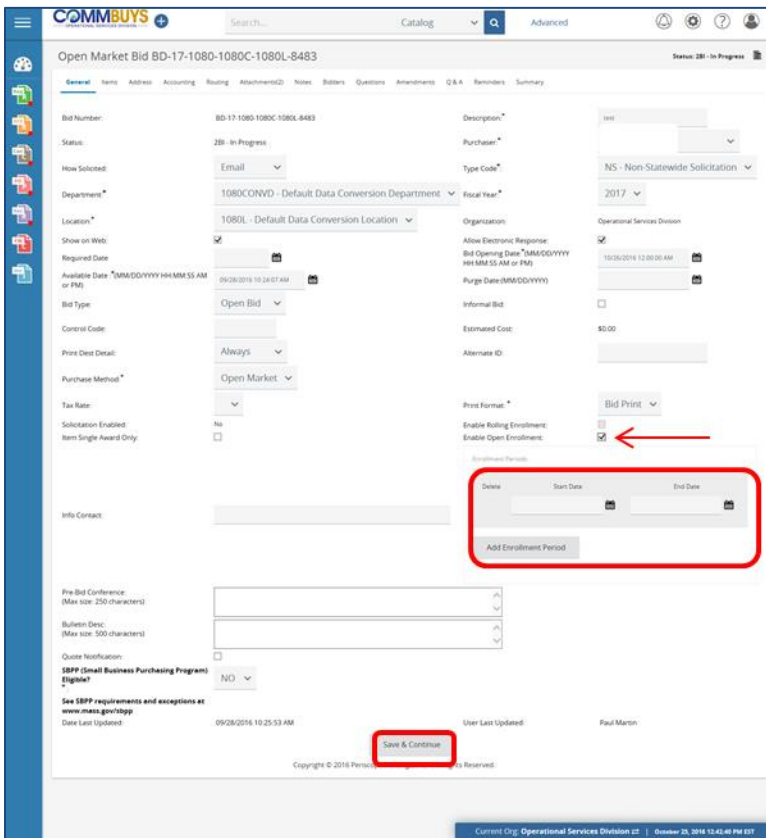
Current Org: Operational Services Division 22 | October 25, 2016 12:33:11 PM EDT

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#### Step 8: Selecting Open Enrollment

1. Select the **Enable Open Enrollment** checkbox. When you do so, note that the Informal Bid checkbox does not fill in with a checkmark.
2. Also note that an **Enrollment Periods** popup box displays – a function that will allow the user to enter the start date and end date of the open enrollment period. It also allows the user to add additional periods.
3. Once the period(s) has been entered, click on the **Add Enrollment Period** button.
4. Scroll to the bottom of the screen and click on the **Save & Continue** button.



The screenshot shows the 'Open Market Bid' form in the COMMBUYS system. The bid number is BD-17-1080-1080C-1080L-8483. The status is 'In Progress'. The 'Enrollment Periods' section is highlighted with a red box, showing the 'Add Enrollment Period' button. The 'Save & Continue' button at the bottom is also highlighted with a red box.



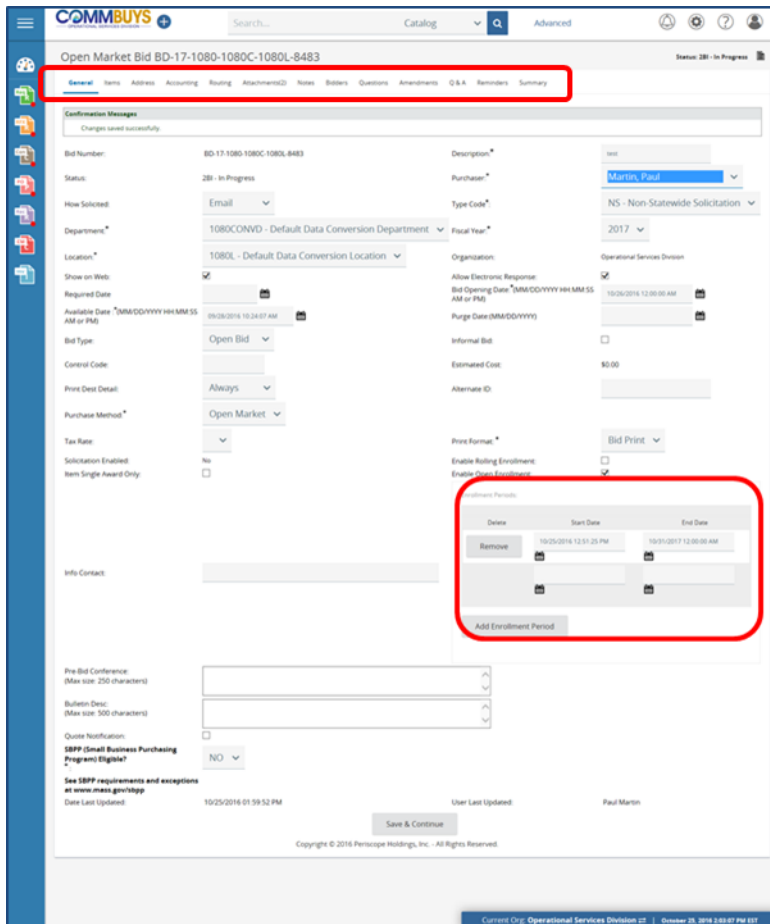
## Job Aid:

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#### Step 9: Completing the Remaining Tabs

1. The General tab screen redisplay with the enrollment period filled in. Continue working through the tabs from left to right filling in all the information.
2. When you get to the Summary tab page, scroll to the bottom and click on the **Submit for Approval** button.

**NOTE:** For additional information on completing the tab screens, the complete process is outlined in the Buyer Job Aid entitled *How to Create a Bid From Scratch*.



COMMbuys

Open Market Bid BD-17-1080-1080C-1080L-8483

General | Items | Address | Accounting | Routing | Attachments | Notes | Bidders | Questions | Amendments | Q & A | Reminders | Summary

Confirmation Messages

Changes saved successfully.

Bid Number: BD-17-1080-1080C-1080L-8483

Status: 2B - In Progress

How Solicited: Email

Department: 1080CONVD - Default Data Conversion Department

Location: 1080L - Default Data Conversion Location

Show on Web: ☒

Required Date: 10/25/2016 10:24:07 AM

Available Date: MM/DD/YYYY HH:MM:SS AM or PM

Bid Type: Open Bid

Control Code: Always

Print Desc Detail: Open Market

Purchase Method: Tax Rate: No

Solicitation Enabled: Item Single Award Only: ☐

Info Contact:

Pre Bid Conference (Max use: 250 characters)

Bulletin Desc: (Max use: 300 characters)

Quote Notification: ☐

SBPP (Small Business Purchasing Program) Eligible? NO

See SBPP requirements and exceptions at www.mass.gov/sbpp

Date Last Updated: 10/25/2016 01:59:52 PM

User Last Updated: Paul Martin

Save & Continue

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Current Org: Operational Services Division 02 | December 26, 2016 2:03:07 PM EST